



## **RAILROAD RETIREMENT BOARD**

### **Agency Forms Submitted for OMB Review, Request for Comments**

In accordance with the Paperwork Reduction Act of 1995 (44 U.S.C. Chapter 35), the Railroad Retirement Board (RRB) is forwarding an Information Collection Request (ICR) to the Office of Information and Regulatory Affairs (OIRA), Office of Management and Budget (OMB). Our ICR describes the information we seek to collect from the public. Review and approval by OIRA ensures that we impose appropriate paperwork burdens.

The RRB invites comments on the proposed collections of information to determine (1) the practical utility of the collections; (2) the accuracy of the estimated burden of the collections; (3) ways to enhance the quality, utility, and clarity of the information that is the subject of collection; and (4) ways to minimize the burden of collections on respondents, including the use of automated collection techniques or other forms of information technology. Comments to the RRB or OIRA must contain the OMB control number of the ICR. For proper consideration of your comments, it is best if the RRB and OIRA receive them within 30 days of the publication date.

*1. Title and purpose of information collection: Application to Act as Representative Payee; OMB 3220-0052*

Under Section 12 of the Railroad Retirement Act (45 U.S.C. 231k), the Railroad Retirement Board (RRB) may pay benefits to a representative payee when an employee, spouse or survivor annuitant is incompetent or is a minor. A representative payee may be a court-appointed guardian, a statutory conservator or an individual selected by the RRB. The procedures pertaining to the appointment and responsibilities of a representative payee are prescribed in 20 CFR 266. The forms furnished by the RRB to apply for representative payee status, and for securing the information needed to support the application follow. RRB Form AA-5, *Application for Substitution of Payee*, obtains information needed to determine the selection of a representative payee who will serve in the best interest of the beneficiary. RRB Form G-478, *Statement Regarding Patient's Capability to Manage Benefits*, obtains information about an annuitant's capability to manage their own benefits. The form is completed by the annuitant's personal physician or by a medical officer, if the annuitant is

in an institution. It is not required when a court has appointed an individual or institution to manage the annuitant's funds or, in the absence of such appointment, when the annuitant is a minor. The RRB also provides representative payees with a booklet at the time of their appointment. The booklet, RRB Form RB-5, *Your Duties as Representative Payee-Representative Payee's Record*, advises representative payees of their responsibilities under 20 CFR 266.9 and provides a means for the representative payee to maintain records pertaining to the receipt and use of RRB benefits. The booklet is provided for the representative payee's convenience. The RRB also accepts records that are kept by representative payees as part of a common business practice. Completion is voluntary. One response is requested of each respondent.

*Previous Requests for Comments:* The RRB has already published the initial 60-day notice (91 FR 13868 on March 23, 2026) required by 44 U.S.C. 3506(c)(2). That request elicited no comments.

### **Information Collection Request (ICR)**

Title: Application to Act as Representative Payee

OMB Control Number: 3220-0052

Forms submitted: AA-5, G-478, and RB-5

Type of request: Revision of a currently approved collection

Affected public: Individuals or Households; Business or other for Profit

Abstract: Under Section 12 of the Railroad Retirement Act, the Railroad Retirement Board (RRB) may pay benefits to a representative payee when an employee, spouse or survivor annuitant is incompetent or is a minor. The collection obtains information related to the representative payee application, supporting documentation and the maintenance of records pertaining to the receipt and use of benefits.

Changes proposed: The RRB proposes the following changes to Forms AA-5, G-478 and RB-5:

Form AA-5:

- Question 4: Changed "No – Explain in Item 17" to "No – Explain in Item 18"
- Question 10: Added checkbox for "Care Facility"

- Question 12: Added checkbox for “Wages from employment”
- Question 19: Removed bullet “If the beneficiary begins to receive a public service pension, or there is a change in the amount of the pension” to comply with the Social Security Fairness Act of 2023 and added bullet “If there is any change to the beneficiary’s banking information;”
- Page 7: Changed office hours.
- Page 8: Changed last sentence of the Paperwork Reduction Act Notice to “Railroad Retirement Board, ATTN: Bureau of Information Services/Policy & Compliance, 844 N. Rush St., Chicago, IL 60611-1275.”

Form G-478:

- Changed last sentence of the Paperwork Reduction Act Notice to “Railroad Retirement Board, ATTN: Bureau of Information Services/Policy & Compliance, 844 N. Rush St., Chicago, IL 60611-1275.”
- Question 9: Added "Doctor/Clinic Tax ID" data entry line.

Form RB-5:

- Pages 1 and 8: Changed the office hours, added secure email and website information.

The burden estimate for the ICR is as follows:

Form Number	Annual Responses	Time (Minutes)	Burden (Hours)
AA-5	<u>3,000</u>		<u>900</u>
Individuals	2,250	18	675
Institutions	750		225
G-478	2,000	6	200
RB-5	<u>15,300</u>		<u>15,300</u>
Individuals	11,475	60	11,475
Institutions	3,825		3,825

Total	38,600		30,600
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2. *Title and purpose of information collection:* Supplement to Claim of Person Outside the United States; OMB 3220-0155.

Under the Social Security Amendments of 1983 (Public Law 98-21), which amends Section 202(t) of the Social Security Act, effective January 1, 1985, the Tier I or the overall minimum (O/M) portion of an annuity, and Medicare benefits payable under the Railroad Retirement Act to certain beneficiaries living outside the U.S., may be withheld. The benefit withholding provision of P.L. 98-21 applies to divorced spouses, spouses, minor or disabled children, students, and survivors of railroad employees who (1) initially became eligible for Tier I amounts, O/M shares, and Medicare benefits after December 31, 1984; (2) are not U.S. citizens or U.S. nationals; and (3) have resided outside the U.S. for more than six consecutive months starting with the annuity beginning date. The benefit withholding provision does not apply, however to a beneficiary who is exempt under either a treaty obligation of the U.S., in effect on August 1, 1956, or a totalization agreement between the U.S. and the country in which the beneficiary resides, or to an individual who is exempt under other criteria specified in P.L. 98-21.

RRB Form G-45, *Supplement to Claim of Person Outside the United States*, is currently used by the RRB to determine applicability of the withholding provision of P.L. 98-21. Completion of the form is required to obtain or retain a benefit. One response is requested of each respondent.

*Previous Requests for Comments:* The RRB has already published the initial 60-day notice (91 FR 13869 on March 23, 2026) required by 44 U.S.C. 3506(c)(2). That request elicited no comments.

### **Information Collection Request (ICR)**

Title: Supplement to Claim of Person Outside the United States

OMB Control Number: 3220-0155

Form(s) submitted: G-45

Type of request: Revision of a currently approved collection

Affected public: Individuals or Households

Abstract: Under Public Law 98-21, the Tier I or the overall minimum portion of an annuity and Medicare benefits payable under the Railroad Retirement Act to certain beneficiaries living outside the United States may be withheld. The collection obtains the information needed by the Railroad Retirement Board to implement the benefit withholding provisions of P.L. 98-21.

Changes proposed: The RRB proposes the following changes to Form G-45:

- Changed last sentence of the Paperwork Reduction Act Notice to “Railroad Retirement Board, ATTN: Bureau of Information Services/Policy & Compliance, 844 N. Rush St., Chicago, IL 60611-1275.”
- Question 9 (d) and (e): Replaced “checks” with “correspondence” and other minor editorial changes to comply with Executive Order 14247, *Modernizing Payments To and From America’s Bank Account*.

The burden estimate for the ICR is as follows:

Form Number	Annual Responses	Time (Minutes)	Burden (Hours)
G-45	24	10	4

*3. Title and purpose of information collection: Repayment of Debt; OMB 3220-0169*

When the Railroad Retirement Board (RRB) determines that an overpayment of Railroad Retirement Act or Railroad Unemployment Insurance Act benefits has occurred, it initiates prompt action to notify the annuitant of the overpayment and to recover the money owed the RRB. To effect payment of a debt by credit card, the RRB utilizes Form G-421F, Repayment by Credit Card. The RRB’s procedures pertaining to benefit overpayment determinations and the recovery of such benefits are prescribed in 20 CFR 255 and 340. One form is completed by each respondent. Completion is voluntary.

*Previous Requests for Comments:* The RRB has already published the initial 60-day notice (91 FR 13869 on March 23, 2026) required by 44 U.S.C. 3506(c)(2). That request elicited no comments.

**Information Collection Request (ICR)**

Title: Repayment of Debt

OMB Control Number: 3220-0169

Form(s) submitted: G-421F

Type of request: Extension without change of a currently approved collection

Affected public: Individuals or Households

Abstract: When the RRB determines that an overpayment of benefits under the Railroad Retirement Act or Railroad Unemployment Insurance Act has occurred, it initiates action to notify the claimant of the overpayment and to recover the amount owed. The collection obtains information needed to allow for repayment by the claimant by credit card, in addition to the customary form of payment by check or money order.

Changes proposed: The RRB proposes no changes to Form G-421F.

The burden estimate for the ICR is as follows:

Form Number	Annual Responses	Time (Minutes)	Burden (Hours)
Form G-421F (RRA) activity	360	5	30
Form G-421F (RUIA) activity	175	5	15
Total	535		45

*Additional Information or Comments:* Copies of the forms and supporting documents or comments regarding the information collection should be addressed to Brian Foster, Railroad Retirement Board, 844 North Rush Street, Chicago, Illinois 60611-1275 or emailed to [Brian.Foster@rrb.gov](mailto:Brian.Foster@rrb.gov).

Written comments and recommendations for the proposed information collection should be sent within 30 days of publication of this notice to [www.reginfo.gov/public/do/PRAMain](http://www.reginfo.gov/public/do/PRAMain). Find this particular information collection by selecting "Currently under 30-day Review - Open for Public Comments" or by using the search function.

**Brian Foster,**

*Clearance Officer.*

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